DOCUMENT RESUME

ED 410 867 HE 030 463

AUTHOR Blanchard, William; Malmberg, Margaret A.
TITLE In the Corporate Eye: A Case Study of Institutional Advancement Joining with Business Administration To Measure Corporate Perceptions of Program Value. AIR 1997 Annual Forum Paper.
PUB DATE 1997-05-00
NOTE 15p.; Paper presented at the Annual Forum of the Association for Institutional Research (37th, Orlando, FL, May 18-21, 1997).
PUB TYPE Reports - Research (143) -- Speeches/Meeting Papers (150)
EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Adult Students; *Business Administration Education; Case Studies; Degrees (Academic); Education Work Relationship; Enrollment Trends; Higher Education; Institutional Advancement; Institutional Research; Job Skills; Job Training; *Labor Force Development; *Marketing; Part Time Students; Program Development; *School Business Relationship; *Small Colleges
IDENTIFIERS *AIR Forum; *Lake Erie College OH

ABSTRACT

This case study focused on a small liberal arts college (Lake Erie College, Ohio) over one year during which four milestone events appeared to be pivotal in increasing the willingness of the school to use institutional research for decision-making in areas of program modification and development. At the beginning of the year, the college was faced with enrollment declines in the Master's in Business Administration (MBA) program and the undergraduate business programs. These were followed by the four milestones: (1) development of a marketing research plan to determine possible cooperative arrangements with local employers; (2) a survey of MBA and undergraduate students concerning what they liked and disliked about the college; (3) focused interviews with 20 companies and the resulting report which presented action recommendations; and (4) a concurrent development of a proposal for an accelerated degree completion program for part-time adults. Analysis supports the value of institutional research to institutional decision making. Specific lessons from the case study are drawn including the value of a team-based approach to institutional research, the value of institutional research to institutional advancement efforts, and the value of faculty engagement in market research. (DB)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED 410 867

In the Corporate Eye:
A Case Study of Institutional Advancement Joining with Business Administration To Measure Corporate Perceptions of Program Value

William Blanchard, Associate Dean for Management Studies
and
Margaret A. Malmberg, Dean of the College
Lake Erie College
391 W. Washington Street
Painesville, Ohio 44077
(216) 352-3361
FAX (216) 352-3533

Presented at the 37th Annual AIR Forum
May 18-21, 1997
Orlando, Florida

BEST COPY AVAILABLE

HE 030 463

PERMISSION TO REPRODUCE AND DISSEMINATE THIS MATERIAL HAS BEEN GRANTED BY

AIR

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)
This document has been reproduced as received from the person or organization originating it.
Minor changes have been made to improve reproduction quality.
Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

AIR
for Management Research, Policy Analysis, and Planning

This paper was presented at the Thirty-Seventh Annual Forum of the Association for Institutional Research held in Orlando, Florida, May 18-21, 1997. This paper was reviewed by the AIR Forum Publications Committee and was judged to be of high quality and of interest to others concerned with the research of higher education. It has therefore been selected to be included in the ERIC Collection of Forum Papers.

Jean Endo
Editor
AIR Forum Publications

Abstract

This case study focuses on four milestones in the span of a year that, in retrospect, seem pivotal in terms of increasing the willingness of a small liberal arts college to use institutional research for decision-making around issues of program modification and program development. The authors discuss what occurred and present lessons learned from the process of linking the Office of Academic Affairs and the Office of Institutional Advancement in collaborative efforts to conduct institutional research. Observations are intended to stimulate readers' thinking about ways to increase the capacity to conduct institutional research on their own campuses, especially if their colleges are small. The case study implies that the use of an interdisciplinary team that spans faculty and administration to conduct institutional research is a cost-effective way to spearhead institutional change.

Purpose

The purpose of this case study is to place before the reader the set of factors that influenced decision-making as the case evolved. This case study focuses on four milestones in the span of a year that, in retrospect, seem pivotal in terms of increasing the willingness of Lake Erie College to use institutional research for decision-making around issues of program modification and program development. We discuss what occurred and present lessons learned from the process of linking the Office of Academic Affairs and the Office of Institutional Advancement in collaborative efforts to conduct institutional research. Our observations are intended to stimulate readers' thinking about ways to increase the capacity to conduct institutional research on their own campuses, especially if their colleges are small.

Related Literature

Higher education and the corporate world recognize the need to identify, market and assess their core competencies. In these endeavors, however, creating institutional support for change is a key factor (Hamel, 1996; Matier, Sidle, and Hurst, 1995). Crossdisciplinary collaboration in the design and implementation of qualitative and quantitative research acknowledges the social nature of investigation. While there are multiple ways of conceptualizing such collaboration (Hamilton and Sherman, 1996; Wasser and Bresler, 1996), the benefits and challenges of adopting a collaborative approach to examining college image within the corporate community will be examined here.

Historical Background

This case study is about lessons learned in attempting to cross traditional and seemingly impermeable organizational boundaries. The purpose of this boundary crossing was to facilitate organizational change by fostering collaboration between the Offices of Academic Affairs (AA) and Institutional Advancement (IA), both of which report to the President. Historically, these offices have not worked together on projects because their functions are different. AA oversees the delivery and modification of existing academic programs and the design and implementation of new programs. IA oversees annual and capital fund raising, student recruiting (the Admissions Office), community relations, and alumni relations.

In September 1996 AA set out to design and conduct marketing research in collaboration with IA. The goals of this marketing research were to (1) assess the perceived value of the College's business administration programs, (2) identify the factors that affect enrollment in the undergraduate business administration program and the MBA program, and (3) assess the demand for an accelerated learning program. Results of the marketing research were to be used to support actions the College could take to increase enrollment. Such actions were to be proposed to the President for approval with notification to the Board of Trustees and the faculty in time to permit implementation in the fall of 1997.

Last fall when we were planning the marketing research, we expected that our collaborative effort would lead to more effective promotion and delivery of the College's

business programs, and that IA would have well-trained faculty spokespeople to describe institutional needs to corporations. Further, key decision makers would have increased confidence in the value of institutional research as an aid for decision making about program initiation, change and promotion. In the remainder of this paper we describe what happened and the progress made toward realizing our expectations. What is most interesting about this progress is not the particulars of the research method and results, but the evolution of the points of conflict and agreement between AA and IA throughout the academic year. First we present the situation in June 1996; then we discuss points of conflict and agreement that occurred throughout the year in the context of four milestones.

June 1996

The Associate Dean for Management Studies at Lake Erie College was worried. In June of 1996, Lake Erie College, a small liberal arts institution in Northeast Ohio, was experiencing enrollment decline in his two key programs: MBA and the undergraduate business administration major. His untenured faculty were concerned about their jobs given the enrollment trend.

Comfort with the use of institutional research as a vehicle for institutional change was growing. The new Dean of the College advocated linking institutional research to planning. The college-wide institutional research team she had formed during her first year at the College had already produced valuable, if disturbing, data about student perceptions and satisfaction, results which were shared widely on campus with students, staff, faculty, and members of the Board of Trustees.

The President's prior experiences with institutional research on the campus had been both costly and nonproductive. Now, as a fund raiser leading a capital-campaign to build a new campus center, his focus was on soliciting donations, managing enrollment, and maintaining a balanced budget. A new mission statement and strategic plan had recently been approved by the trustees emphasizing the importance to the College of interdisciplinary initiatives, a global perspective, and community outreach.

All constituencies of the College recognized that the gradual decrease in part-time and full-time enrollment in the MBA and undergraduate business programs, which are the College's largest, posed a threat to the viability of the institution. The President and Vice President for Institutional Advancement sought a dramatic response to the enrollment decline. The business faculty expressed a willingness to participate in marketing research to identify perceived needs of prospective adult students. All members of the College community appeared poised to consider actions other than "business as usual."

Into this mix of circumstances, in June of 1996, came an inquiry from outside the College about the College's interest in beginning an accelerated learning program. Such a program would be designed to meet the needs of a group of students not currently being served.

Milestone 1

In June of 1996, an invited campus visitor described the merits of accelerated learning to the President and administrators and proposed a partnership arrangement with the College. The Dean and two Associate Deans called other colleges already engaged in such programs to find out what their start up costs and enrollment history had been. A

partnership proposal was drawn up but was subsequently rejected by the President as too expensive under the prevailing fiscal constraints. Instead, the President suggested using existing faculty and staff resources to engage in marketing research. The Management Studies faculty then drafted an interview guide which was to be used in the marketing research and presented the guide to the President for review.

At a meeting to review the interview guide, major differences in the purpose and approach to the proposed marketing research became apparent. The President and the Vice President for Institutional Advancement wanted to ask CEOs and other senior managers what the College could do for their employees and to encourage companies to offer courses on site for employees who were reimbursed for furthering their education. The Dean, the Associate Deans, and the faculty wanted to ask human resource directors and prospective students how they perceived the College and what the students wanted from a business program.

Milestone 2

Before beginning the focused interviews with human resource directors, in September two faculty members surveyed 33 MBA and 30 undergraduate students in their classes regarding why and how the students elected Lake Erie College, and what they liked and disliked about the College. These students were asked to complete a short questionnaire which resulted in discussion about their responses. The final paragraph of the one-page report on the results of the in-class survey said:

> In summary, Lake Erie Students have positive attitudes toward their professors, administrative staff members, the small

size of classes, and the location of classes.

Negative attitudes appear to result from failure to maintain buildings and grounds and the lack of educational technology. The inability to offer classes more frequently and at various times was noted as dissatisfying.

This report was presented on October 25 to the Academic Policy and Planning Committee of the Board of Trustees.

Milestone 3

The focused interviews were begun in mid-October and were concluded in December. Twenty companies were selected from a list of companies that had provided employees tuition reimbursement to attend Lake Erie College. If possible, we attempted to interview the human resource manager at each company. Four people from Lake Erie College conducted the interviews, either in person or by telephone: a member of the Arts and Sciences faculty, a member of the Management Studies faculty, the Associate Dean for Management Studies, and the Director of the Management Development Institute, which offers non-credit professional development seminars. Noteworthy is the fact that the interview guide was developed by the Management Studies faculty taking into account concerns of people in IA. These efforts are significant because they involved communication across traditional organizational boundaries and the expansion and redefinition of faculty roles: Faculty, whose traditional role is to teach and attend to curriculum matters within, but not outside, their academic department were working with

others outside their departments and were designing, conducting, and interpreting marketing research for the College.

The six members of the Management Studies faculty and the member of the Arts and Sciences faculty who had conducted interviews prepared a report on the findings and implications for action resulting from the marketing research. That report raised major concerns about Lake Erie College's visibility in the community. The report summarized those concerns in this sentence: "After 140 years in Lake County, we found hiring managers at 19 of the 20 local companies who knew little about Lake Erie College, its programs, or its students, even though at least one employee from each company had attended or is attending LEC."

The report concluded with implications for action, which set the stage for debate and negotiation with the President regarding the validity of the research results and the appropriateness of the implications for action. The report said:

> 1. More resources must be allocated for technology, and the business uses of technology must be taught in the classroom. This will require that faculty have state of the art computers, software, and adequate training.
> 2. A systematic program for recruiting business students must be implemented at both the undergraduate and MBA levels.
> 3. An accurate image of the business programs and Lake Erie College must be cultivated in the minds of prospective students and influencers of the decision to attend College or graduate school. Lake Erie College should be the College of choice for local students

in Lake, Geauga, and Ashtabula Counties.

With the approval of the President, three members of the research team presented the report to the Academic Policy and Planning Committee of the Board of Trustees on January 24, 1997.

Milestone 4

Concurrent with conducting the focused interviews, an AA team of four was developing a proposal for a campus-based accelerated degree completion program for adults. This program is perceived by AA as a way to increase enrollment by attracting part-time students who are not interested in or able to attend any of the College's existing programs. The structure of and budget for this program were and continue to be subjects of negotiation between the President and the AA team. However, the President has said publicly to the faculty and trustees that he wants the College to implement the program during the fall of the 1997-98 academic year, has approved for distribution a program brochure, and has offered the Arts and Sciences faculty member who conducted focused interviews the directorship of the program. A discussion led by the identified director of the proposed fall 1997 accelerated learning program took place with members of the Academic Policy and Planning Committee at its May 2 meeting, and the full Board of Trustees was informed of the new fall 1997 initiative by the co-chairman of the Board of Trustees at their May 3 meeting.

12

Emerging Trends

On our campus, the value of institutional research as a major contributor to institutional decision-making is growing. Productive collaboration across organizational boundaries is paving the way for future teamwork and joint policy creation. The importance of assessment in the life of the College is expanding. Our President has taken the significant action of enlarging and modifying the role of the Director of Institutional Assessment to include the assessment of the College's strategic plan. The College's well-crafted assessment plan, developed at the request of our North Central Association accrediting body, is currently being reconfigured around College priorities laid out in our strategic plan. Resource allocation and outcomes assessment will be tied to the goals specified in the strategic plan.

Lessons Learned

1. Small institutions can use a team-based approach to institutional research to achieve cost efficiencies and to stimulate organizational decision making
2. Preparing a case study of a work-in-progress encourages perspective-taking and offers a forum for insight-generating discussion
3. Engaging faculty in institutional research can provide a vehicle for curriculum revision and innovation.
4. Institutional advancement may share interest in institutional research when broadened to include enrollment management, institutional effectiveness, and quality improvement

5. Small liberal arts institutions can benefit from pooling resources to conduct institutional research
6. Due to faculty engagement in market research, institutional advancement can have more able, confident, and well-trained faculty spokespeople available to assist with describing institutional and academic needs to corporations
7. Collaboration across organizational boundaries can produce greater confidence on the part of key decision makers in the ability of institutional research to contribute to institutional choice-making
8. Policy development and policy clarification can occur as a by product of collaborative discussions across traditional organizational boundaries about such matters as grant writing and grant preparation procedures.

Implications for Institutional Researchers

The case study format provides a forum for the identification and discussion of a broad set of issues, beyond those of data gathering and data analysis, which affect organizational change. The use of an interdisciplinary team that spans faculty and administration to conduct institutional research is a cost-effective way to spearhead institutional change. Moreover, institutional researchers may find productive opportunities to work collaboratively with their Office of Institutional Advancement regarding their work in the areas of curriculum and programmatic evaluation, resource management and quality improvement, enrollment management, and policy analysis, planning, and governance.

References

Cook, W.B. (January/February, 1997). Fund raising and the college presidency in an era of uncertainty: From 1975 to the present. *The Journal of Higher Education*, 53-86.

Hall, M.R. (1993). *The dean's role in fund raising*. Baltimore: The John Hopkins University Press.

Hamel, G. (July/August, 1996). Strategy as revolution. *Harvard Business Review*, *69-82*.

Hamilton, D.L., & Sherman, S.J. (1996). Perceiving persons and groups. *Psychological Review*, 103 (2), 336-355.

Matier, M.W., Sidle, C.C., & Hurst, P.J. (1995). Institutional researchers' roles in the twenty-first century. In T. Sanford (ed.), *Preparing for the information needs of the twenty-first century*. New Directions for Institutional Research, n. 85. San Francisco, Jossey-Bass, 75-84.

Wasser, J.D., & Bresler, L. (1996). Working in the interpretive zone: Conceptualizing collaboration in qualitative research teams. *Educational Researcher*, 25 (5), 5-15.